

# MENTAL HEALTH LEADERSHIP ACADEMY YEAR ONE: 2007-2008

## EVALUATION REPORT SUMMARY

### GOALS AND OBJECTIVES

**Mental Health Leadership Academy (MHLA) Mission:** “To strengthen the leadership competencies and develop the capacity of individual participants to apply business skills and practices and improve organizational performance of North Carolina's Local Management Entities (LMEs).”

**Mental Health Leadership Academy Goal (Year One):** “To facilitate improvements to leadership and business skills of participants by providing information and tools for managing money, people, information and partnerships as applied to advancing the effort to increase the quality and availability of services to consumers that is driving North Carolina's mental health transformation movement. “

**Mental Health Leadership Academy Objectives (Year One):** Core MHLA objectives were to provide opportunities for participants to:

1. Enhance individual leadership performance and improve effectiveness in leadership roles;
2. Develop skills and knowledge to successfully initiate and manage organizational and community innovations required to expand consumer-focused systems of care in the communities served; and,
3. Acquire the tools and capacity essential for mobilizing effective, collaborative service networks.

In achievement of these objectives, the ***MHLA was designed to achieve these specific results:***

1. At least 80% of project participants report (via surveys and interviews with project participants) that the information and tools provided by the MHLA are relevant and applicable to their performance in the workplace.
2. At least 80% of project participants report that the MHLA had a significant impact on their ability to think more like an entrepreneur and contribute to innovation within their organizations.

In addition, the initial project proposal indicated a strategy to: “target 80 participants in teams of three, drawn mostly from senior staff at LMEs, but also some from the Division of Mental Health, Developmental Disabilities, and Substance Abuse...[and] encourage teams to include community partners.”

### PROGRAM DESIGN

Activities were chosen to provide opportunities for participants to acquire the knowledge and skills to:

- Boost individual leadership performance and effectiveness;
- Create and sustain positive organizational and community change that advances efforts to expand consumer-focused systems of care in the communities they serve; and,
- Use collaboration as a strategic tool to expand the reach and impact of their organizations.

**In keeping with stated MHLA goals and objectives, the program was designed around five domains:**

**MANAGING SELF AND OTHERS:** Time management and priority setting; delegation and developing others; managing conflict; self-awareness of personal leadership and management style; and, awareness of skill areas of strength and areas for growth.

**LEADING ORGANIZATIONS:** The role of the leader in organizations; specific skills for leading organizations and teams; skills for leading a learning organization; developing a visionary, innovative culture; managing change; and, fostering an entrepreneurial mindset.

**LEADING NETWORKS:** Topics included negotiation; collaboration; partnership; ensuring service quality; and, tools for managing data.

**FINANCIAL MANAGEMENT:** Reading and developing financial reports; developing and managing budgets; using “time-value of money” concepts; understanding organizational implications of a market orientation; and, managing finances in a network of providers.

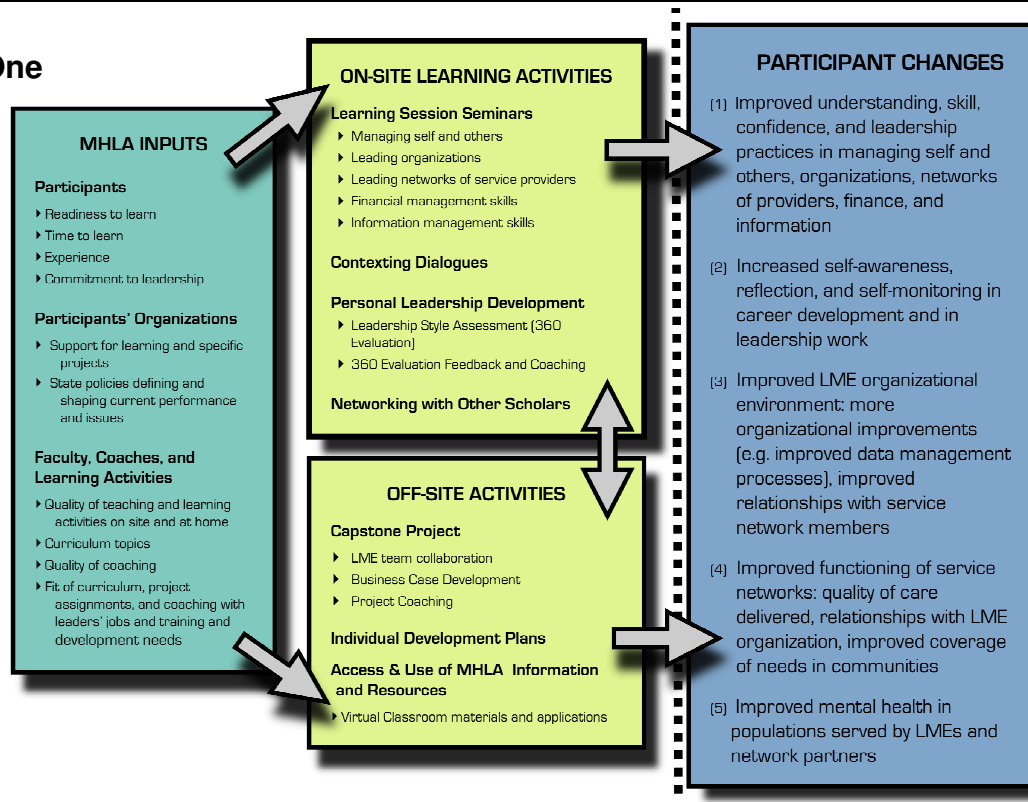
**INFORMATION MANAGEMENT:** Establishing a high performance culture in organizations and networks; using data for quality assurance; and, skills and tools for effective data management.

As such, the program model focused on developing a series of on-site and off-site activities that would allow learners to build on previous successes.

## MHLA ACTIVITIES OVERVIEW

LEARNING SESSIONS	<p>The MHLA curriculum was delivered through three Learning Sessions held at the Paul J. Rizzo Conference Center (located in Chapel Hill) in February, June, and August of 2008. Each session was 2 ½ days in length.</p> <p><b><u>Learning Session Seminars:</u></b> The MHLA curriculum was comprised of ten seminars offered over the course of all three Learning Sessions. The seminar sequence was selected to allow members to build on knowledge and skill gains from previous Sessions. Learners attended sessions in two cohorts in order to increase the quality and quantity of interaction and were placed in cohorts according to LME team to allow teams to discuss and apply content directly to their organization and network.</p>
PERSONAL LEADERSHIP DEVELOPMENT	<p><b><u>Leadership Style Assessment (360° Evaluation):</u></b> The 360° Evaluation analyzed multiple perspectives on ten competency areas deemed critical for effective leadership. Findings enabled learners to compare leadership perceptions and obtain insights into professional obstacles to effective leadership. Results were used to establish a common model for leadership effectiveness, identify strengths and areas for improvement, and develop personal performance targets.</p> <p><b><u>360° Feedback and Coaching:</u></b> Formal coaching enhanced member's learning and focused on improving performance by cultivating a desire to acquire new skills/knowledge and identifying strategies for change. Informal coaching ("peer coaching") provided another opportunity for learners to review and reflect on their 360° results. In addition, peer coaching further developed participants' ability to seek, make sense of, and act on feedback.</p> <p><b><u>Leadership Profile Goal Planning:</u></b> The "Individual Development Plan" was a critical component of the program; it facilitated targeting individual learning priorities and identified activities to support achievement of these priorities.</p>
CAPSTONE	<p><b><u>The Capstone Project:</u></b> This team-based activity was designed to facilitate an exploration of the range of imminent management challenges facing North Carolina's LMEs. Participants were placed in teams according to their LME affiliation and each team chose a focus for their project. Over the duration of the training, teams developed their project focus into comprehensive, practical plans with actionable strategies with support from a Project Coach. Teams presented their work in front of the full Academy at the final MHLA session in August.</p>
OTHER	<p><b><u>The Virtual Classroom Site:</u></b> This online resource was launched in May 2008 as a tool to help participants get the most out of their MHLA experience. The site allows users to access MHLA resources and to benefit from the resources and experiences brought to the table by partners, other MHLA participants, and instructors.</p>

## MHLA Year One LOGIC MODEL



## EVALUATION METHODS

The evaluation used qualitative data from surveys and interviews in conjunction with quantitative data obtained through a survey and to ascertain whether the program's basic objectives had been achieved, as well as to identify and explore any implications for future leadership training. Surveys were also used to measure satisfaction with components of the program, including their satisfaction with the venue, materials, and faculty. A pre/post program survey was used to examine scholars' connections with other leaders, financial management and leadership abilities, and other abilities.

## KEY FINDINGS

In general, **participants reported significant improvements in their connections with other leaders and in their financial management and leadership abilities.** All changes in items related to these constructs were statistically significant.

MHLA PARTICIPATION
<b>RECRUITMENT:</b> The MHLA successfully recruited its target audience. ✓ 75 registered participants ✓ 21 of North Carolina's LMEs were represented ✓ Average of 3.45 MHLA participants per LME <b>RETENTION:</b> The MHLA successfully retained its target audience. ✓ 92% of registrants completed the MHLA
PARTICIPANT CHARACTERISTICS
<b>LME STAFF:</b> In general, participants represented the executive leadership of LMEs; ✓ 15 of 21 participating LMEs sent their Area Directors to the Academy. ✓ Other LME staff came from a diverse mix of roles including QA Managers and Clinical Directors.
<b>COMMUNITY PARTNERS:</b> Nearly half of LME teams included a community partner. ✓ Partner organizations included hospitals, substance abuse treatment center, a juvenile detention center, and other service providers. ✓ 100% of community partner participants held executive leadership positions within their organizations.
<b>OTHERS:</b> MHLA successfully engaged staff from the Division of Mental Health, Developmental Disabilities, and Substance Abuse as participants in the program.

## IMPACT ON INDIVIDUAL PARTICIPANTS

Program participants indicated that they learned skills primarily in four key areas:

1. **LEADERSHIP/MANAGEMENT:** MHLA assisted participants in assessing their own management and leadership styles, skills and core areas where growth and skill development would have a beneficial impact on their organization.
2. **AFFECTING CHANGE IN THEIR ORGANIZATIONS AND NETWORKS:** MHLA assisted participants by developing their understanding of the process for implementing change and provided practical change strategies. Participants indicated that they gained "*ideas of ways to affect change in [their] agency*" and sessions provided a "*new perspective on how to impact change as a leader within my own organization.*"
3. **INVOLVING AND TRAINING STAFF:** MHLA provided practical ideas and methods for leaders seeking ways to "*involve staff and get them to participate with enthusiasm*" and "*resources to use in training staff in the future.*" MHLA activities catalyzed individual reflection on and insight into current management practices; participants indicated that the MHLA had motivated them to change different aspects of their approach to involving and training staff including delegation, communication with internal staff, organization, and a new or renewed understanding of the importance of developing a shared organizational vision.
4. **VISION FOR THE FUTURE:** Participants said the focus on leadership was helpful because it helped shift the focus onto the mission and vision of the organization.

## IMPACT ON PARTICIPANTS' ORGANIZATIONS

At the close of the August session 95% of participants had at least one specific example of how they had already used information and/or skills learned through the MHLA to improve their organization, network, or the programs and services they offer. In the words of one participant, "*I have become more aware of my leadership style and ways that I can become a more effective manager. I have implemented organizational/structure changes with my*

*11-staff unit as a result and have been able to delegate responsibilities with confidence.”* Many participants felt that the instruction gave them something they could apply in their own organizations.

## LEARNING SESSION FINDINGS

**FEBRUARY:** The majority of participants agreed that the opening 3-day session was excellent and all anticipated that the program would be personally and professionally valuable.

- ▶ Most were glad that they enrolled in the program and indicated they had gained a lot from the program in the first three days.
- ▶ Nearly every participant found the program to be helpful or partly helpful to him or her in their role and their organization.

**JUNE:** The majority of participants strongly agreed that the program had been personally valuable.

- ▶ All participants felt that they had gained things from the program that were important and helpful and most participants (89%) characterized those gains as substantial.

**AUGUST:** The majority of participants agreed that the 3-day session was excellent. Most strongly agreed: The program had been valuable to them and that the gains they made were worth the time investment.

- ▶ They would recommend the MHLA to colleagues and are a better leader for having participated in the MHLA.

## LEARNING SESSION SEMINAR FINDINGS

Overall, Learning Session Seminars and MHLA faculty were very positively evaluated by participants; MHLA attendees described the course material as relevant to their work and the faculty instruction as highly effective. Seminar evaluations showed that sessions led to increases in participants' ability to practically apply topics to their work. Overall, participants indicated that:

- ▶ Sessions significantly contributed to their existing understanding of course topics.
- ▶ They had high levels of information retention.
- ▶ They believed that sessions helped them become more effective leaders.
- ▶ They planned to implement ideas they had learned in sessions.

## PERSONAL LEADERSHIP DEVELOPMENT FINDINGS

Participants consistently provided positive responses when offering feedback about regarding the 360° Evaluation and Individual Development Plan process.

- ▶ Participants positively evaluated both their formal and informal coaching activities and most cited input from others as an influential factor in their Leadership Profile Goal Planning.
- ▶ Participants identified peer coaching as an important personal development activity.

### SESSION ONE: FEBRUARY 27-29, 2008

**Leading and Managing in an Era of Uncertainty**, Jim Johnson, Ph.D.  
**Leadership in Organizations, Managing in Organizations**, Ben Rosen, Ph.D.  
**Financial Accounting**, CJ Skender, Ph.D.

### SESSION TWO: JUNE 2-4, 2008

**Managing for Organizational Performance**, Rebecca Wells, Ph.D.  
**Negotiation**, Bob Adler, JD  
**Facilitating a Learning Organization**, Laura Bierma, Ed.D\*

### SESSION THREE: AUGUST 11-13, 2008

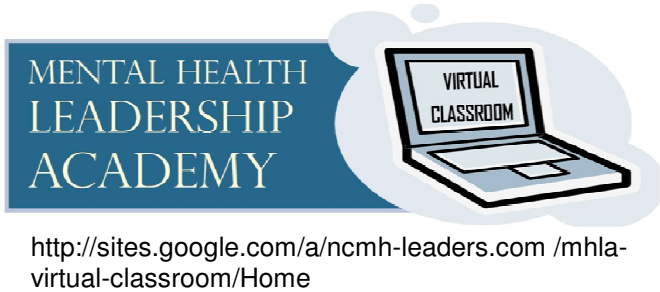
**From Contract Manager to Public Management**, Robert Agranoff, Ph.D.  
**Team Negotiations and Power Dynamics**, Elliot Silverstien, Ph.D., JD  
**People on the Move: Implications for North Carolina's Health and Competitiveness**, Jim Johnson, Ph.D.  
**Presentation Skills: A Practical Approach**, Heidi Schultz, Ph.D.

- ▶ Many described the ability to network, connect, and get valuable feedback from other professionals as a unique and valuable activity that they would like to see replicated in the future.
- ▶ Most participants found the process of writing their Leadership Profile Goals valuable.
- ▶ Nearly all expected working on their goals to be a rewarding process that would contribute to their professional development.
- ▶ The majority of participants described their Leadership Profile Goals as moderately difficult they indicated a high level of confidence in their ability to achieve them in their general description of goals as highly to moderately feasible.

## VIRTUAL CLASSROOM FINDINGS

Overall, MHLA participants were aware of the Virtual Classroom site, and had made use of site resources. Five weeks after site launch:

- ▶ 83% were aware of the Virtual Classroom site.
- ▶ 2 out of 3 reported having visited the site, 81% had visited the site more than once.
- ▶ Session Documents (91%) and Announcements (67%) were the most used features of the site.



MHLA participants reported that the site provided “*easy access to information*,” made it “*easy to find documents*” and was “*well designed*.” In the 4 ½ month operating interval for year one, the Virtual Classroom site was visited more than 400 times by an average of 48 unique visitors each month.

## CAPSTONE PROJECT FINDINGS

Participant perceived value of the Capstone Project was mixed, while most agreed that the business case had been helpful, their endorsement of that approach was moderate, with several not finding it helpful or only somewhat agreeing that it was helpful. It is difficult to ascertain the full extent of the projects’ influence on participants’ organizations since at present no suitable data are available to undertake a rigorous evaluation. However, while in no way conclusive, an examination of the Capstone Projects and their intended impacts gives an indication of the project’s potential positive effects on these organizations.

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***THIS IS A SUMMARY OF THE FULL EVALUATION REPORT. TO REQUEST A COPY OF THE FULL EVALUATION REPORT, OR LEARN MORE ABOUT THE MENTAL HEALTH LEADERSHIP ACADEMY, PLEASE CONTACT AL HUNTOON AT [AHUNTOON@NCMH-LEADERS.COM](mailto:AHUNTOON@NCMH-LEADERS.COM) OR JILL BOSCHINI AT [JBOSCHINI@NCMH-LEADERS.COM](mailto:JBOSCHINI@NCMH-LEADERS.COM).***